



California Solar Initiative

Revised Interim
Marketing & Outreach
Plan
PY 2009

6/15/2009

California Solar Initiative

CCSE Revised Interim Marketing & Outreach Plan – PY 2009

Introduction

This document revises the outline of marketing activities and materials that the California Center for Sustainable Energy (CCSE) proposes to utilize during the 2009 calendar year to implement its administrative responsibilities for the California Public Utilities Commission (CPUC's) California Solar Initiative (CSI) in the San Diego Gas & Electric (SDG&E) service territory. In accordance with Appendix A to Decision 07-05-047 (D.07-05-047, referred to subsequently herein as "the Decision"), we submit this plan on an interim basis, subject to Energy Division staff review and approval in consultation with the assigned Commissioner. Implementation strategies may evolve as the program proceeds, in response to the needs of the marketplace and specific customer feedback.

This Plan outlines a broad array of activities that will allow CCSE to train key industry stakeholders, as well as introduce and promote the CSI to prospective market participants, customers, and the community at large. After receiving additional direction from the Commission, CCSE submits this Revised Interim Marketing and Outreach Plan for 2009, which focuses primarily on those activities specifically called out in the Decision and Guidelines for 2008 Interim M & O Plans, Energy Division, November 2007.

This document is organized in tabular form consisting of the following attached tables:

Table 1: Revised CCSE 2009 Interim M&O Budget and Progress Report

Table 2: CCSE Responses to ED Staff Recommendations Included in ED's Approval of CCSE 2009 Interim M&O Budget

Table 3: CCSE Responses to ED Staff-Identified Needs to be Addressed Included in ED's Approval of CCSE 2009 Interim M&O Budget

Summary Request for Additional Funds

CCSE respectfully requests an additional \$100,000 in CSI M&O funds to be utilized for the ongoing San Diego solar mapping tool project.

The City of San Diego was selected in 2007 by the U.S. Department of Energy as one of its 25 "Solar America Cities" as part of the "Solar America Initiative" (SAI). The SAI seeks to make PV-generated electricity cost-competitive with conventionally generated electricity from the utility grid by 2015. CCSE is a project partner working with the City of San Diego and CH2MHill to create a powerful solar mapping tool. Indeed, CCSE requested and received from the Commission an additional \$75,000 for development of the San Diego Solar Map as part of our June 2008 Interim M&O Update. The contract for utilization of these funds was put in place at the end of 2008, and the first phases of work are nearing completion. The Solar Map will roll out officially in July 2009, with a press conference currently being coordinated with Mayor Sanders' office. The tool will serve both to highlight the City's and region's accomplishments in using and promoting solar energy, as well as to market to and educate home and business owners on the benefits of solar power and how to acquire it. CCSE looks forward to demonstrating to Energy Division staff the current Solar Map, and to describing specific

enhancements that will assist in disseminating the CSI message and enabling widespread consideration of solar energy systems.

Currently the San Diego Solar Map shows existing solar installations, a rough estimate of potential capacity at sites without solar, and locally-relevant tools that support customer decision making. Tools include a moderated online solar forum, and a calculator that allows homeowners to determine the impact of solar PV on their electric bill and carbon footprint. Among the enhancements we propose for additional CSI M&O funds are:

- Precise evaluations of solar potential for publicly-owned buildings and major institutions throughout the City of San Diego and the region as a whole. SDG&E service territory covers a large geographical area, and detailed analysis of all buildings is beyond the budget and scope of the mapping project. However, public and institutional facilities are the most important to characterize in the near term, given their potential positive impact on the program and the solar marketplace;
- Further development of locally tailored decision making tools for residents and businesses
- Develop “widgets” that will enable solar installers to integrate Solar Map functionality into their web sites;
- Integration of property-assessed financing (“AB 811”) programs as they roll out in the various jurisdictions.

These additional funds will complement any ongoing DOE/SAI program activities, as well as potentially stimulus-related efforts by the City of San Diego and other smaller jurisdictions in the region.

Table 1: Revised CCSE 2009 Interim M&O Budget and Progress Report

Line Item	Budget Amount	Progress Statement
Installer Training	\$100,000.00	CCSE has continued to provide a variety of high quality solar-related workshops geared towards solar contractors, homeowners, business owners and other notable constituents. CCSE is aware of the need to include all portions of the solar value chain in order to successfully implement the CSI and reach the goals that have been set. With that said, our in-house trainings range from economics of solar for residential and non-residential applications, five-part alternative financing arrangements for solar projects, solar for homeowners and job training in solar. Our future solar workshops will involve permitting for solar projects, solar and federal tax credits and CSI Application Process trainings.
Targeted Marketing		
<i>Direct Mail</i>	\$20,000.00	Proposed direct email advertising with San Diego Union Tribune (local newspaper) email campaign whereby the emails will be addressed from CSI, and we can select the exact demographic to upwards of more than 100,000 email addresses based on any number of search criteria without being marked as spam.
<i>Interactive Outreach</i>	\$10,000.00	Met with SDG&E team on June 5, 2009, to discuss the exchange of web banners and co-promotions, particularly with CSI/NSHP and Energy Efficiency sections of our mutual websites

Line Item	Budget Amount	Progress Statement
<i>Radio Tags/PSA</i>	\$100,000.00	Working on deliverables for the Eye on Green campaign featuring Sophie and KXYX radio and yahoo/aol internet radio commercials to drive listeners to the Eye on Green interactive micro site. An Eye on Green web banner on the two radio station websites will link to the micro site. A 15-second CSI video PSA pre-reel on station websites will run when listeners click to listen to live streaming content. In addition, we are in contact and taking bids for traditional radio advertising as well.
<i>Television</i>	\$75,000.00	Last year's 15-second CSI PSA still running on Cox Cable channels at no charge. Getting quotes on a new schedule for airing on Cox Cable channels.
Newsletter	\$30,000.00	Executing newsletter monthly on a timely basis. Subscriber list has grown to more than 5,000 with VIP subscribers (senators and other elected officials) opting in from Washington, D.C.
Printed Collateral	\$25,000.00	Updating of CCSE CSI brochure when run out of current stock. Possible update of Government/non-profit and energy efficiency guidelines fact sheets. Possible additional printed collateral for Solar Energy Week event. Consumer guide does not need updating yet.
Video (CCSE portion)	\$0.00	<p>The CSI Program Administrators (PAs) completed a short video to guide installers through the CSI application process, per the Decision. We were directed that further video production will not be addressed at this time and to provide ED with a plan to reallocate this funding. Video funds for 2009 have been reallocated to Cooperative Marketing Efforts to cover an expected shortfall.</p> <p>CCSE is completing production of the CSI Go Solar, California! video next week and will forward to the ED for comment. The video is intended for web distribution. Funds were allocated for the video in 2008. The CSI PAs decided to table production of a statewide CSI video/commercial to air on TV until further notice. Reallocation of video funds for 2009 is TBD.</p>
Online Training	\$30,000.00	CCSE has held several workshops via WebEx allowing constituents to participate in CCSE events through alternative means. CCSE has also created canned WebEx presentations that are available for download.
Bundled Outreach		
<i>Newspaper and Magazines</i>	\$35,000.00	San Diego Union Tribune (UT) newspaper advertising surrounding Earth Day in April/May. Four Ads in UT, with first one published on Saturday, April 18, 2009, in Smart Living-Solar themed section, and additional publications on April 28, May 9, and May 16. Additionally, these ads appeared in the May 2, 9, 16, and 23 Enlace Spanish insert of the UT (free of charge). Lastly, a CSI Go Solar article interviewing CCSE's CSI Program Manager, John Supp, ran in Green Living column of the UT on April 28, 2009 (free of charge).
<i>Alliances and Co-Promotions</i>	\$40,000.00	CCSE's San Diego Excellence in Energy (SANDEE) Awards attended by over 250 people. Also, displayed at EarthFair 2009 and displayed at Solar Power International 2009.
<i>Cooperative Marketing Efforts</i>	\$35,000.00	Updating Installer, Commercial and Residential Fact sheets to incorporate a more community/human approach. Also collaborating on the CSI Wall Calendar. Online consumer guide tabled.

Line Item	Budget Amount	Progress Statement
Total CSI - General	\$500,000.00	
Request for Additional Funding	\$100,000.00	In June 2008, CCSE originally requested additional funds in the amount of \$75,000.00 to be utilized for the on-going San Diego solar mapping tool project in coordination with the Solar America Initiative. To date, CCSE has utilized these funds to develop a county-wide map of solar projects, including separate layers for each host customer sector and total installations by zip code. The funds have also supported the development of a residential rate analysis and PV sizing tool to help residential customers understand the financial benefits of solar. The project is expected to be launched with a press conference planned for July 2009. CCSE requests additional funds in the amount of \$100,000 for further development of the San Diego solar mapping tool.
Total CSI - MASH	\$25,000.00	
<i>Seminars/ Workshops</i>		CCSE will host a monthly "Intro to MASH" workshop to familiarize stakeholders with the MASH program. Workshops will also include a quarterly "Affordable Housing Finance" for contractors and consultants, "Utilizing Virtual Net Metering" for all stakeholders, and "Track 2 Application Process" for potential Track 2 applicants. These workshops will also be posted on CCSE's MASH webpage.
<i>Printed Collateral</i>		CCSE will work with other MASH PAs to produce, print and distribute a statewide program fact sheet and a Virtual Net Metering fact sheet. The MASH fact sheets will be updated at least one time. CCSE will also produce a tri-fold brochure specific to the SDG&E territory.
<i>Community Education and Outreach</i>		CCSE recognizes that the MASH market is limited, so education and outreach efforts will be targeted towards private developers, government entities, relevant associations, lenders, contractors and consultants. Resources will be applied to market research; identifying the stakeholders that stand to benefit from the program. The outreach will focus on reaching out to stakeholders on an individual basis and conducting MASH presentations as part of site visits.
<i>Conferences/ Events</i>		In order to promote the MASH program, CCSE will seek to participate in relevant conferences, either by presenting as part of a panel or through hosting a booth. The conferences include Housing California, Novogradac's Financing Renewables through Tax Credits, HUD's Energy Conference, and San Diego Housing Federation's annual conference.
<i>Alliances and Co-promotion</i>		As designed, MASH heavily involves two groups, the affordable housing community and the renewables/energy efficiency community. As a PA, CCSE will work to educate the two communities about each other. We will create alliances and co-promote events with established organizations in both sectors, including SDGE, the San Diego Housing Commission and the San Diego Housing Federation. Events will include a conference titled "Greening San Diego's Affordable Housing" and a vendor fair.

Table 2: CCSE Responses to ED Staff Recommendations Included in ED's Approval of CCSE 2009 Interim M&O Budget

Category	Recommendation	Progress Statement
1. Training and Education	CCSE was advised to provide the Energy Division with a schedule detailing all trainings and workshops within 30 days of the approval of its 2009 Interim M&O Plan.	Ben Airth completed workshop schedule and submitted to Energy Division (ED) by May 7, 2009, per approval.
	CCSE was instructed to maintain a database of class attendees and develop follow-up strategies with attendees.	Cindy Zulick completed this task.
2. Coordination with SDG&E utility customers	Staff encouraged open communication and, when possible, collaboration with SDG&E to deliver regular, efficient and actionable CSI messaging to SDG&E customers.	Collaborative quarterly workshop calendars and SDG&E information displayed in the Energy Resource Center. Met with SDG&E on June 5, 2009, to discuss providing consumer guides and other CSI brochures for distribution at SDG&E events and public areas. Awaiting confirmation.
3. Direct Mail	Staff requested that CCSE meet with the ED to discuss targeting procedures for direct mail campaigns within 30 days of the approval of its 2009 Interim M&O Plan.	John Supp and Kim Sykes held phone meeting with ED's Amy Reardon on May 7, 2009, to discuss a direct email campaign strategy through the San Diego Union Tribune (UT). Met with UT sales rep on May 15, 2009, to discuss cost and demographic distribution for reporting back to the ED. The UT can provide lists with specific demographic criteria selected to reach the exact target market.

Category	Recommendation	Progress Statement
	CCSE was directed to develop follow-up strategies for direct mail campaigns to determine campaign effectiveness and to assess further informational needs of the target audience.	CCSE is checking with the UT to see if a link function is available for the e-blasts that would link to the CCSE CSI portion of the website for ROI tracking. CCSE will also suggest that a landing page be developed for this campaign where customers will be asked if they want to be added to the CSI newsletter distribution list and/or receive additional information.
	CCSE may integrate solar/CSI Program messaging with other DSM programs to share costs of direct mail.	TBD if appropriate for direct email campaign
4. Interactive Outreach	Staff re-emphasized the importance of coordination, when possible, with SDG&E. One suggested area of coordination that CCSE might explore is through internet links (such as banners on relevant pages) between CCSE's and SDG&E's websites.	CCSE met with SDG&E team on June 5, 2009, to discuss the exchange of web banners on appropriate pages such as the CCSE CSI residential page/SDG&E NSHP page and mutual energy efficiency pages.
5. Radio/Television PSAs	CCSE was directed that it must submit scripts/stills/recordings of PSAs to staff for approval per Approval Guidelines, attached, or activity will be subject to disallowance.	Working on deliverables for Eye on Green radio/web campaign. Negotiating ad buys for radio and TV advertising. ED will receive radio scripts for approval prior to air. ED has received copy of 15-second video PSA (sent May 6, 2009), which is being negotiated to run on Cox Cable networks and possibly during San Diego Padres baseball games as part of the schedule.

Category	Recommendation	Progress Statement
6. Newspapers/Magazines	Staff suggested that in addition to advertorials, CCSE develop a pro-active press strategy to ensure the CSI Program gets increased coverage in local media as often as possible. CCSE was directed to maintain a list of media coverage to provide ED staff with periodic updates.	CCSE is keeping an up-to-date media spreadsheet of CSI program coverage, which is available upon request. CCSE received prior approval for the CSI Go Solar article that ran in the Green Living section of the San Diego Union Tribune on April 28, 2009, and provided the ED with a digital copy. CCSE will provide periodic PR updates, as directed in the Approval of its 2009 Interim M&O Plan.
7. Monthly Electronic Newsletter	CCSE was required to purchase email credits from the vendor, Vertical Response, when needed to fulfill distribution.	CCSE recently purchased credits and is up to date with credits needed to fulfill newsletter distribution.
8. Printed Collateral	Staff encouraged as much coordination as necessary with SDG&E to ensure that its customers are receiving timely and useful CSI information.	Contact made with SDG&E marketing, NSHP and green programs teams on June 5, 2009, to discuss coordination of materials to make sure the most pertinent up-to-date materials are exchanged. SDG&E will be visiting the Energy Resource Center (ERC) to see what added materials can be provided, and CCSE is providing SDG&E with consumer guides, fact sheets and brochures for distribution at public events and in public display centers.
9. Online Training Sessions and Resources	CCSE was directed to provide a request for approval prior to expenditure, in accordance with the Interim M&O Approval Procedures, that outlines the session's contents and needed resources.	CCSE will provide training session and resource requests to the ED prior to expenditure, as needed.

Category	Recommendation	Progress Statement
10. Alliances and Co-Promotions	CCSE was directed to provide the ED with a list of alliances and co-promotions as they are developed, and to follow the approval procedures prior to expenditures.	CCSE's CSI Team participated in Earth Day events and reached constituents through the San Diego Excellence in Energy (SANDEE) Awards, highlighting San Diego CSI rebate customers and other leaders in energy efficiency.
11. Bundled Outreach	CCSE was directed to follow the M&O Approval Process for both stand-alone and bundled materials, and to identify the cost allocation methodology used to determine CSI's portion of the costs.	Primary bundled outreach event is Solar Energy Week scheduled for September 27 - October 3, 2009.
12. Cooperative Marketing Efforts		The CSI PAs are collaborating on a CSI Wall Calendar and updated fact sheets and have tabled the online consumer guide. No updates are currently needed to the printed CSI consumer guide. CCSE's CSI Team also participated with other CSI PAs at Energy Management Congress and will participate in Solar Power 2009.

Table 3: CCSE Responses to ED Staff-Identified Needs to be Addressed Included in ED's Approval of CCSE 2009 Interim M&O Budget

Category	Recommendation	Progress Statement
1. Advanced Metering	To support consumers' evaluation of solar options during the advanced meter rollouts scheduled per R.02-06-001, the Advanced Metering Initiative (AMI), ED Staff requested that CCSE identify opportunities to provide CSI messaging, perhaps as part of an integrated DSM effort to customers during key touch points as the new meters are deployed under AMI.	SDG&E and Google are partnering to provide an on-line interface for customers to view their demand via linkage to SDG&E's smart meter data. More information is at: http://www.sdge.com/smartmeter/googlePilot.shtml CCSE will be investigating the feasibility of incorporating PV system metering with the SDG&E's smart metering data and Google's on-line interface.

Category	Recommendation	Progress Statement
2. Community Outreach	The evolving solar market requires integrated approaches for marketing and outreach to be fully effective, and supports CCSE's approach to flexible, "grass-roots" community outreach, alliances and co-promotions. As in past budget cycles, a degree of fungibility is acceptable for strategic community solar promotion. The CSI PAs were directed to submit an outline of events for 2009 and bundled outreach opportunities that will be expensed to this account.	CCSE's CSI Team has collaborated and co-promoted the following events: San Diego Excellence in Energy (SANDEE) Awards attended by over 250 guests, San Diego Earth Fair 2009, and the San Diego Home and Garden Show. Upcoming events include Solar Power International 2009, Rebuild Central Lake Arrowhead Fire Survivors, COX Conservers, CCSE Solar Energy Week, and CCSE Sustainability Fair.
3. Branding	To support the value of the Go Solar California brand, the CSI PAs were directed to use the Go Solar California logo on all CSI materials and messaging opportunities, following approved logo usage guidelines (available from ED Staff). (ED Staff to provide the appropriate graphic files upon request.)	CCSE's Marketing Team strictly adheres to this requirement to follow ED-approved Go Solar California logo usage guidelines.
4. Go Solar PA Portal	ED Staff encouraged CCSE to take "ownership" of its own portal on the Go Solar California website that provides users with high-level CSI information and links to the CCSE website.	CCSE has ensured contact information on the Go Solar California website is current and up-to-date.

Category	Recommendation	Progress Statement
5. Approval Format and Expense Reporting	<p>CSI PAs were directed to follow the updated approval process format when submitting materials for ED review and approval. To receive final approval for individual collateral and activities, CSI PAs were directed to provide a file of the proposed material and project details on the Approval Request Form. The approval form will enable the CPUC to track and maintain data on all CSI funded M&O activities, and will be requested in addition to semiannual administrative expense report filings. The CSI PAs were directed to continue to follow the Standardized Expense Reporting Worksheet when itemizing expenses associated with interim M&O activities.</p>	<p>To date, since receipt of the Approval of its 2009 Interim M&O Plan, CCSE is compliant with all reporting guidelines. The MOARF has been filled out and submitted to the ED (April 24, 2009, for the San Diego Union Tribune & June 2, 2009, for Eye on Green) for paid advertising booked since receipt of the Approval, and a running log of advertising and PR is being kept and updated accordingly.</p>